

Introduction to Knowledge Transfer

What is Knowledge Transfer?

Knowledge transfer is the ongoing process of eliciting and communicating knowledge from one part of the organization to another (or all other) parts of the organization. Knowledge transfer seeks to organize, create, capture and distribute knowledge and ensure its availability for future users.

The knowledge in knowledge transfer refers to any information or experience that is:

- a. Held by a particular individual or section/unit in the organization; and
- b. Essential to the smooth operation of any aspect of the organization, including the maintenance of healthy human relationships.

Knowledge may or may not be documented. Some of the knowledge to be transferred may be impossible to document, but essential to the organization nonetheless.

Transfer, in the case of workforce planning, involves ensuring that knowledge and information is passed along to other individuals or groups:

- a. At any time, so that to the extent possible, information essential to the organization does not reside only in one person; and
- b. Especially in the case of the imminent departure of an employee, board member or other key player, to ensure their roles and their knowledge are documented to the extent possible. Where documentation is not possible, knowledge transfer ensures the information is passed on in narrative form (memo, verbal, video, etc.)

It is more than just a matter of communication. If it were merely that, a memorandum, an e-mail or a meeting would transfer the information sufficiently. Knowledge transfer is more complex because (1) knowledge resides in its organizational members, tools, tasks, and their networks; (2) additionally much of the knowledge in organizations is hard to articulate. Knowledge Transfer is an important tool in Succession Planning, and therefore plays a key role in workforce planning.

Why is Knowledge Transfer Important?

Knowledge transfer has always been a challenge for organizations. Recently, organizations have moved away from hierarchical methods of control toward more decentralized organizational structures and increased employee involvement. This has resulted in more creativity by frontline employees, but fewer obvious organizational paths through which the transfer can occur. Finally, advances in information technology have created new means of knowledge transfer. However, technology alone cannot solve the problem of knowledge transfer. Organizational structures and practices must facilitate and motivate transfers.

Knowledge transfer is only valuable when it is integrated into a set of policies for knowledge generation and capture.

It is important to capture existing knowledge in order to create smooth transitions and not impede organizational work and processes.

Knowledge Transfer in Succession Planning

Knowledge transfer has a special place in Succession Planning (see the separate webpage on this Workforce Planning Toolkit site). Succession planning ensures that key positions and roles will be filled by qualified and effective individuals. In order to ensure they can use the skills they bring to their work, they must be the recipients of the institutional knowledge of the organization, and the individual knowledge of their predecessors and colleagues.

How Can Knowledge Transfer Help ME? (. . . and my organization)

- Knowledge transfer supports succession planning by ensuring that key new staff are equipped with essential information from those leaving positions
- It builds systems and documentation processes that help keep information from becoming “siloes” in isolated units, but rather available to several or many staff
- It is important to capture existing knowledge in order to create smooth transitions and not impede organizational work and processes.

Types of Knowledge to be Transferred

Knowledge that is:

1. Dependent on conceptual skills and cognitive abilities. This is practical, high-level knowledge where objectives are met through perpetual recognition and revamping.
2. Action-oriented and consists of contextual practices. This knowledge is usually acquired through social interaction. (e.g. “Let’s try it this way.”) It is a non-explicit type of knowledge, based on how individuals interact in and interpret their environment.
3. Cultural. This type of knowledge is achieved through shared understandings through socialization and acculturation. Language and negotiation are the most obvious ways this knowledge is communicated in an enterprise, but more subtle methods often apply (e.g. body language).
4. Embedded. This knowledge is explicit and resides within systematic routines. It relates to the relationships between roles, technologies, formal procedures and emergent routines within a complex system.
5. Conveyed in signs and symbols (books, manuals, data bases, etc.). Where the above forms of knowledge depend on context, this form is de-contextualized into codes of practice. Rather than being a specific type of knowledge, it deals more with the transmission, storage and interrogation of knowledge.
6. Institutional. This knowledge is gained and retained when organizations translate historical information into useful knowledge and wisdom. Institutional memory relies on the preservation of data and information, and the analytical skills necessary for its effective use within the organization.

Challenges to Knowledge Transfer, and Tools to Overcome Them

Challenges to Knowledge Transfer

Many factors created challenges to the organization as it works to ensure the preservation and communication of its valuable knowledge resources. These are some of that challenges that will need to be addressed:

- The inability to recognize & articulate or highly intuitive competencies that individuals have developed, more-or-less on their own
- Multiple locations, geography or distance
- Lack of a shared purpose and mission/vision
- Lack of common language
- Multiple areas of expertise
- Internal conflicts (e.g. professional territoriality, protectionism)
- Generational and cultural differences
- Labor relations
- Lack of incentives for sharing information
- Dependence on visual representations to transfer knowledge
- A climate that inhibits the sharing of beliefs, assumptions, and cultural norms
- Previous negative exposure or experience with something
- Substantial misconceptions about the work, the organization, or each other
- Faulty information
- An organizational culture that is not conducive to knowledge sharing (the "knowledge is power" culture)
- Motivational issues
- Lack of trust

Practices Shown to be Effective in Transferring Knowledge

- Mentoring and/or master-apprenticeship (formal and/or informal)
- Work shadowing / paired work
- Communities of practice(groups of people doing similar work & sharing best practices)
- Cross-training and cross-project learning
- Rewards and/or incentives (as a means of motivating for knowledge sharing)
- Knowledge mapping (a map of knowledge repositories within an organization, accessible to all)
- Communication of best practices
- Competency management (systematic evaluation and planning of competencies of individual organization members)
- Conducive physical and facilities environment, or technologies that overcome the obstacles presented by a lack of proximity or architecture
- Effective use of technology: collaborative technologies (software) / knowledge repositories (databases, etc) / social software (wikis, social bookmarking, blogs, etc)
- Measuring and reporting (assessment/evaluation)

- Assigned “knowledge brokers” (particular organizational members who take responsibility for a specific "field" or subject matter, and who act as first reference on how to access information in that area)
- Effective use of exit interviews and the information provided in them.

How to Begin Knowledge Transfer

- Identify those who hold key knowledge within the organization
- Motivate those individuals to share (provide incentives)
- Design a mechanism to facilitate the transfer of knowledge
- Execute the transfer plan
- Evaluate/assess to ensure the transfer has occurred, and address problems as they arise
- Apply the knowledge transferred, and incorporate into the operating systems, the strategic plan and the performance management system of the organization

How Management Can Promote Knowledge Transfer

Training

Training staff to both **disseminate** and **adopt** new ideas may revolve around making them aware of where else in the organization their ideas may be useful and where else ideas may arrive from. Employees must also know how to use technology to post and search for new ideas. A receiver's ability to understand an idea, "absorptive capacity", can be a barrier. This can only be resolved through increasing the worker's own knowledge base, requiring an increased emphasis on substantive ongoing education and training.

One difficulty with existing training efforts is their lack of integration. To be most effective, training on creativity should include designing solutions that include opportunities for validation and dissemination of ideas.

Incentives

Employees are most likely to spend energy sharing what they know if they are in a workplace with incentives. Both monetary rewards and recognition can prompt people to be more open with information and can create corporate cultures in which sharing of information is valued.

Structures

The most important structural component that encourages creativity or idea generation is often providing time to experiment and tinker. This may run counter to other productivity measures that emphasize efficiency. Also, formal employee involvement structures such as brainstorming, suggestion programs, and self-directing teams support both creating and sharing knowledge. People need the power and the responsibility to make improvements.